

# **SiteManager** **Training Manual**



Module A  
Chapter 1  
**Contract Administration**  
**Contract Records**  
**Contracts**

Section A-1-1-b

## **Modifying the Contract Window**

Student's Version

Indiana Department of Transportation  
March 2009, Version 3.9b

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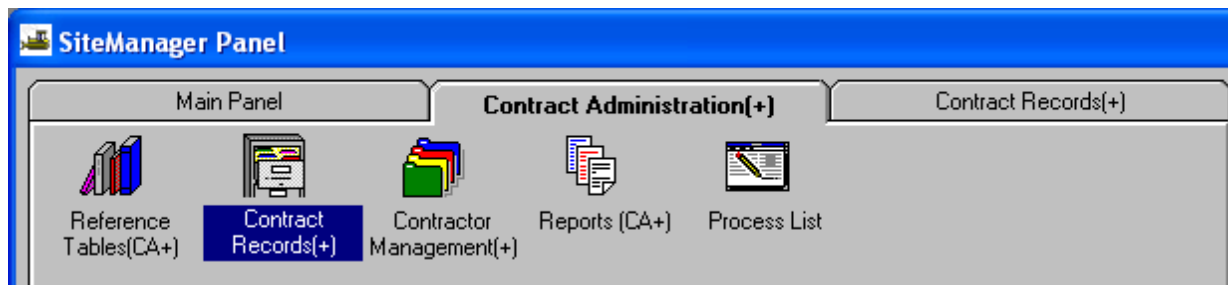
## Modifying the Contract window in SiteManager

The contract window will be modified throughout the contract for the following purposes:

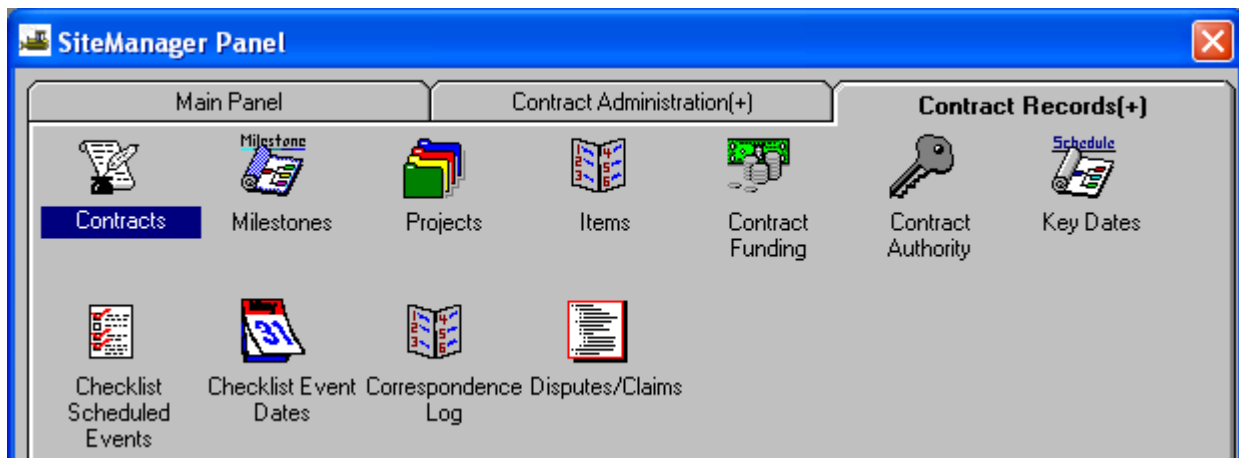
- A. Modifying the name of the Generic Fields window (page 3)
- B. Changing the retainage percentage (page 4)
- C. Entering Critical Date information (page 6)
- D. Modifying the contract personnel information (page 10)
- E. Change the Prime Contractor when the Prime Contractor has defaulted (page 11)
- F. Changing the status of the contract to Complete (page 14)



“Double-click” on **Contract Administration** located on the **Main Panel**.



“Click” on **Contract Records**.



“Double-click” on **Contracts**.

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** Open

Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID:  Fed St/Pr Proj Nbr:   
 Status: Pending Primary PCN:   
 District:  Area:   
 Progress Sched:  Variance Pct: .00  
 Desc:   
 Time Charges:  Bid Days:  Bid Amt: \$0.00  
 Contract Type: Spaces  
 Work Type: Spaces  
 Funding: ☐ Federal ☐ State/Province ☐ Both  
☐ Fed Oversight ☐ Local Oversight  
 Proposal Fund Type:   
 Spec Yr:  Unit System:  Suppl Spec Bk Yr:  Alt ID:

Wage Decision: Wage Decision ID Wage Decision Description Genrl Wg Dcsn ID

“Click” on the **Open**  button located on the toolbar.

**Select Contract**

Selection

Contract ID

Find :

Contract ID

Contract ID	Vendor ID	Fed State Proj Nbr	Status	County	Lvl 2	Lvl 3	Lvl 4	Loca
R -90006	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT QA
R -90007	99-9999988	STP 3387005	ACTV	C087	660			ON SR 261 AT QA
R -90008	99-9999977	STP 3387005	ACTV	C087	660			ON SR 261 AT QA
R -90009	99-9999966	STP 3387005	PEND	C087	660			ON SR 261 AT QA
R -90010	99-9999955	STP 3387005	PEND	C087	660			ON SR 261 AT QA
R -90011	99-9999999	STP 3387005	ACTV	C087	660			ON SR 261 AT QA

OK Cancel

A list of the contracts in SiteManager are listed.  
 Use the Filter/Find/Sort techniques to locate the appropriate contract.  
 “Double-click” on the appropriate **Contract ID**.

## A. Modifying the Generic Fields window.

Wage Decision:	Wage Decision ID	Wage Decision Description	Genrl Wg Dcsn ID
	INDOT001	State Default Wage Decision	INDOT001

“Click” on the **Generic Fields** icon.

Additional Contract DBE Data			
	DBE	MBE	WBE
Goal Percent:	0	0	0
Original Commitment Amount:	\$0.00	\$0.00	\$0.00
Actual Ending Amount:	\$0.00	\$0.00	\$0.00

- **Program Budget Manager:** “Enter” the name of the Program Budget Manager in the **Program Budget Manager** field.
- **Project Manager:** **Project Manager** is the name of the Project Manager for the Contract. Specific messages and reports are sent to this person by the system. “Enter” the name of the **Project Manager** in the **Project Manager** field.
- **Design Firm:** “Enter” the name of the firm who designed the contract in the Design Firm field.
- **CNDT59 – Letter Date of FA Letter:** “Enter” the Final Acceptance letter date.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts**  
Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit T

Contract ID: R-90011 **INDOT**

Program Budget Manager: Mona Funds

Project Manager: Guenevieve Lorendo

Design Firm: Designs R Us

CNDT59 - Letter Date of FA Letter: 00/00/00

**Additional Contract DBE Data**

	DBE	MBE	WBE
Goal Percent:	6	0	0
Original Commitment Amount:	\$0.00	\$0.00	\$0.00
Actual Ending Amount:	\$0.00	\$0.00	\$0.00

(IN) User Working on Process:

Date Cleared: 00/00/00

Compliance Indicator:

Date 30 Day Notice Letter is Sent: 00/00/00

- **Goal Percent:** “Enter” the goal set for the contract at time of letting if appropriate.
- **Original Commitment Amount:** The amount that the contractor listed on their Affirmative Action Certification in their bid, they were committing to pay the DBE sub. “Enter” the amount, if appropriate.
- **Actual Ending Amount:** The amount that the contractor actually paid the sub. “Enter” the amount, if appropriate.
- **(IN) User Working on Process:** the person who is working on the review of the final. “Enter” the name, if appropriate.
- **Date Cleared:** the date that the DBE Utilization letter was written and sent to Contract. “Enter” the date, if appropriate.
- **Compliance Indicator:** the indicator for final review to know the status of the utilization, whether P for partial, Q for quantities or X for non-compliance. “Enter” the appropriate indicator, if appropriate.
- **Date 30 Day Notice letter is Sent:** the date the letter of notification to the contractor that they have 30 days to submit DBE-#, MBE/WBE-3 forms. “Enter” the date, if appropriate.

To close this window “Click” the **Generic Fields**  button located on the toolbar.

## B. Changing the Retainage Percentage

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** New

Description Location **Payment Data** Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: R-90011 Current Contract Amt: \$658,493.35

Generate Est1 Day: 1 Contract Limit Amt: \$0.00 Liquidated Dam Rate Amt: \$1,100.00

Generate Est2 Day: 15 Contract Limit Pct: .00

**RETAINAGE**

☐ Securities Allowed ☐ Retain Stkpled Ind ☒ Unlimited Escrow Max Escrow Amt: \$0.00

☐ Auto Liquidated Dam ☐ Price Adjmt Ind

**Retainage Changes:**

Work Compl Basis	Effect Date	Pct	Pct Base	Max Pct	Max Amt	Lump Amt	Trgr Pct	Trgr Base
WORK IN PLACE	03/01/05	10.00	CURRENT A	.00	\$0.00	\$0.00	.00	CURRENT A

“Click” on the **Payment Data** tab. If the retainage is reduced, “click” in the **Retainage Charges** panel.

“Click” the **New** button located on the toolbar to create a new entry.

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** Save

Description Location **Payment Data** Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: R-90011 Current Contract Amt: \$658,493.35

Generate Est1 Day: 1 Contract Limit Amt: \$0.00 Liquidated Dam Rate Amt: \$1,100.00

Generate Est2 Day: 15 Contract Limit Pct: .00

**RETAINAGE**

☐ Securities Allowed ☐ Retain Stkpled Ind ☒ Unlimited Escrow Max Escrow Amt: \$0.00

☐ Auto Liquidated Dam ☐ Price Adjmt Ind

**Retainage Changes:**

Work Compl Basis	Effect Date	Pct	Pct Base	Max Pct	Max Amt	Lump Amt	Trgr Pct	Trgr Base
WORK IN PLACE	03/01/05	10.00	CURRENT A	.00	\$0.00	\$0.00	.00	CURRENT A
WORK IN PLACE	07/12/05	3.00	CURRENT A	.00	\$0.00	\$0.00	.00	CURRENT A

**Work Compl Basis:** The **Work Compl Basis** indicates the method used for calculating Retainage.

“Select” **WORK IN PLACE** for the **Work Compl Basis** field.

**Effect Date:** The **Effective Date** is the date the new retainage percentage begins.  
“Enter” the date the retainage is reduced in the **Effect Date** field.

**Pct:** The **Percent** is the retainage percentage to be applied to the Contract.  
“Enter” the new retainage percentage in the **Pct** field.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts** Save

Description Location **Payment Data** Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: R-90011 Current Contract Amt: \$658,493.35  
Generate Est1 Day: 1 Contract Limit Amt: \$0.00 Liquidated Dam Rate Amt: \$1,100.00  
Generate Est2 Day: 15 Contract Limit Pct: .00 ☐ Auto Liquidated Dam  
☐ Price Adjmt Ind

**RETAINAGE**  
☐ Securities Allowed ☐ Retain Stkpled Ind ☒ Unlimited Escrow Max Escrow Amt: \$0.00

**Retainage Changes:**

Work Compl Basis	Effect Date	Pct	Pct Base	Max Pct	Max Amt	Lump Amt	Trgr Pct	Trgr Base
WORK IN PLACE	03/01/05	10.00	CURRENT A	.00	\$0.00	\$0.00	.00	CURRENT A
WORK IN PLACE	07/12/05	3.00	CURRENT A	.00	\$0.00	\$0.00	.00	CURRENT A

**Pct Base:** The **Percent Base** indicates that retainage should be calculated as a percentage of the bid amount or the current amount. Verify Current Amount is selected.

**Max Pct:** Max Percentage is not utilized by INDOT.

**Max Amt:** The **Max Amount** field is not utilized by INDOT.

**Lump Amt:** The **Lump Amt** field is not utilized by INDOT.

**Trgr Pct:** The **Trigger Percent** field is not utilized by INDOT.

**Trgr Base:** The **Trigger Base** field is not utilized by INDOT.

“Click” the **Save**  button located on the toolbar.



## C. Entering Critical Date information

**Contracts**

Contract ID: R-90011

Critical Date Description	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	N	N
Award Date	02/16/05	N	N
Price Adjustments Base Date	00/00/00	N	N
Execution Date	02/16/05	Y	N
Letting Date	02/16/05	N	N
Original Completion Date	00/00/00	N	N
Checked Out to Field Date	00/00/00	N	N
Substantial Completion Date	00/00/00	N	N
Contractor Bankruptcy Date	00/00/00	N	N
Contractor Default Date	00/00/00	N	N
Notice to Proceed Date	03/01/05	N	N
Signed Date	00/00/00	N	N
First Day of Work	00/00/00	N	N

**Critical Date Description:** Final Acceptance Date

**Actual Occurrence Date:** 00/00/00 ☐ Required to Activate ☐ Required to Finalize

**Distribution List:**

**Recipient ID:**

**Message Text:**

“Click” on the **Critical Dates** tab.

### Definitions of Critical Dates:

1. **Accepted Date:** Accepted Date is not utilized by INDOT.
2. **Adjusted Completion Date:** Adjusted Completion Date is calculated by an authorized change order.
3. **Award Date:** Award Date is the date that the contract has been awarded to the contractor.
4. **Checked Out to Field Date:** The Checked Out to Field Date is not utilized by INDOT
5. **Contract Archived Date:** The Contract Archived Date is entered by the Contract archival process.
6. **Contractor Bankruptcy Date:** Contractor Bankruptcy Date is the date the contractor’s date of bankruptcy.
7. **Contractor Default Date:** Contractor Default Date is the date the prime contractor defaults on the contract.
8. **Final Acceptance Date:** is not utilized by INDOT in this window. Refer to the Key Date window to locate the Final Release date for the contract.
9. **Execution Date:** Execution Date is the same as the **Award Date**.
10. **Letting Date:** is a date that the contract bids are opened.
11. **Notice to Proceed Date:** is a written notice to the contractor to proceed with the contract work.
12. **Open to Unrestricted Traffic Date:** is not utilized by INDOT.
13. **Original Completion Date:** Original Completion Date is the date that the contract is to be completed as per the awarded contract.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts**

Description Location Payment Data **Critical Dates** Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: IR-90011

Critical Date Description	Actual Date	Required to Activate	Required to Finalize
Final Acceptance Date	00/00/00	N	N
Award Date	02/16/05	N	N
Price Adjustments Base Date	00/00/00	N	N
Execution Date	02/16/05	Y	N
Letting Date	02/16/05	N	N
Original Completion Date	00/00/00	N	N
Checked Out to Field Date	00/00/00	N	N
Substantial Completion Date	00/00/00	N	N
Contractor Bankruptcy Date	00/00/00	N	N
Contractor Default Date	00/00/00	N	N
Notice to Proceed Date	03/01/05	N	N
Signed Date	00/00/00	N	N
First Day of Work	00/00/00	N	N

Critical Date Description: Final Acceptance Date

Actual Occurrence Date: 00/00/00 ☐ Required to Activate ☐ Required to Finalize

Distribution List:  Recipient ID:

Message Text:

**14. Physical Work Complete Date:** Physical Work Complete Date Before entering this date, all Change Orders must be approved or denied. When this date is entered, the system notifies personnel and enters final quantities for active Items and moves all active items to final status. Once this date has been entered and saved, the user will no longer be able to post DWRs on items moved to the Final status.

**15. Price Adjustments Base Date:** is not utilized by INDOT.

**16. Signed Date:** is not utilized by INDOT.

**17. Substantial Completion Date:** field is not utilized by INDOT in this window. Refer to the Key Date window to locate the Substantial Completion date for the contract.

**18. First Day of Work Date:** is not utilized by INDOT in this window. Refer to the Key Date window to locate the First Day of Work date for the contract.

**19. Assign to FieldManager Date:** is not utilized by INDOT.

“Click” on the appropriate **Critical Date Description**.

“Click” in the bottom panel. Verify the **Critical Date Description** is the correct Critical Date.

**Actual Occurrence Date:** “Enter” the date of the occurrence in the **Actual Occurrence Date** field.

“Click” on the **Save**  button located on the toolbar.

## D. Modifying the contract personnel information

The screenshot shows the AASHTO SiteManager application window. The 'Contracts' tab is active, and the 'Primary Personnel' sub-tab is selected. The form contains the following fields and sections:

- Contract ID:** R-90011
- PE/PS:** d30iques (Quest, John {101301456})
- Area Engineer:** d30lfarm (Farmer, Frank {111051948})
- Contract Designer:** Sally Rolindez
- Contract Created By:** SYSTEM
- Notification Recipients:**
  - Contract Status Changed to Active:**
    - User ID: [ ] Distribution List: [ ]
  - Work Progress Behind Schedule:**
    - User ID: [ ] Distribution List: [ ]
  - Civil Rights Exception Report Generated:**
    - User ID: [ ] Distribution List: [ ]

“Click” on the **Primary Personnel** tab.

**PE/PS:** PE/PS is the names of the **Project Engineer/Project Supervisor** for the Contract. Specific messages and reports are sent to this person.

“Enter” the name of the Project Engineer/Supervisor in the **PE/PS** field.

**Area Engineer:** The **Area Engineer** is the name of the Area Engineer whom the contract is assigned.

“Enter” the name of the Area Engineer in the **Area Engineer** field.

**Contract Designer:** **Contract Designer** is the name of the person that designed the Contract.

“Enter” the name of the Contract Designer in the **Contract Designer** field.

“Click” the **Save**  button located on the toolbar.

## E. Change the Prime Contractor when the Prime Contractor has defaulted

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts**

Description Location Payment Data Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90011

Current Prime: 99-9999999 BLACK SIDE UP PAVING ☐ Joint Venture

Payroll: ☐ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

Bankruptcy Date: 06/06/05 Bankruptcy Type Desc: Spaces

Defaulted: ☐ Indicator Reason: Spaces Date: 00/00/00

Original Prime Contractor:

Prime Contacts:

Contact Name	Contact Type	User Id
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Prime Associates:

Assoc Vendor ID	Associate Short Name	Associate Type
00-0000002	Insurance Place Holder - See Time*port	Insurance
00-0000003	Sure As Taxes Surety	Surety

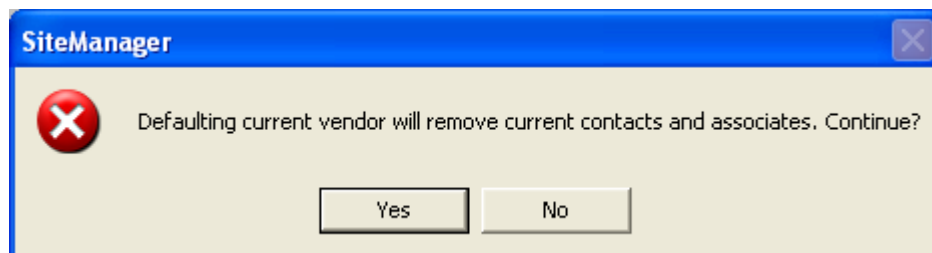
“Click” on the **Prime Contractor** tab.

When the Prime Contractor defaults, a new Prime Contractor is associated to the contract by performing the following steps:

**Bankruptcy Date:** The **Bankruptcy Date** is the date the Original Prime Contractor’s date of Bankruptcy.

“Enter” the date of bankruptcy in the Bankruptcy Date field, if applicable.

“Click” the **Indicator** check-box located in the **Defaulted** box.



“Click” **Yes**.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts**  
Description Location Payment Data Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90011  
Current Prime:  ☐ Joint Venture

Payroll  
☒ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

Bankruptcy Date: 06/06/05 Bankruptcy Type Desc: Spaces

Defaulted  
☒ Indicator Reason: BANKRUPTCY Date: 00/00/00  
Original Prime Contractor: BANKRUPTCY

Prime Contacts:

Prime Associates:

**Reason:** Reason is the reason the original Prime Contractor defaulted.  
 “Click” the Reason drop-down list.  
 “Click” on the appropriate Reason, if applicable.

**AASHTO SiteManager**  
File Edit Services Window Help

**Contracts**  
Description Location **Search** Critical Dates Primary Personnel **Prime Contractor** DBE Commit Training Plan

Contract ID: R-90011  
Current Prime:  ☐ Joint Venture

Payroll  
☒ Required Freq in Weeks: 0 Max Subcontract Pct: 50.00 ☐ Subcontractors Paid

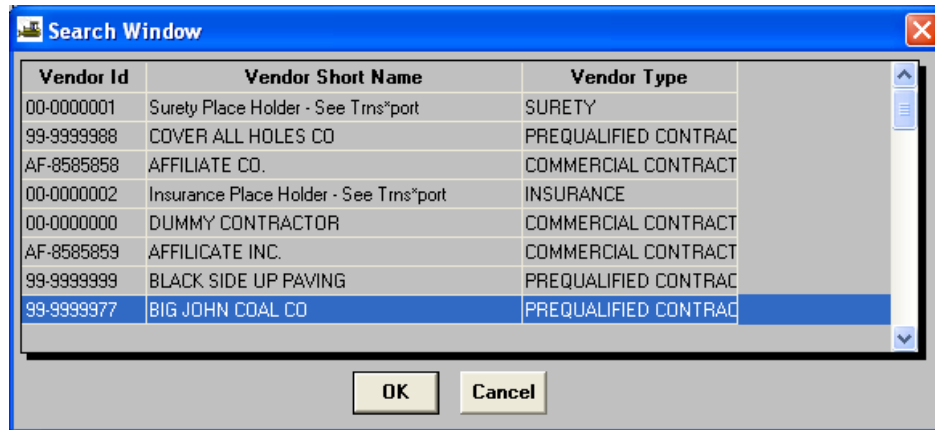
Bankruptcy Date: 06/06/05 Bankruptcy Type Desc: Spaces

Defaulted  
☒ Indicator Reason: BANKRUPTCY Date: 00/00/00  
Original Prime Contractor: 99-999999 BLACK SIDE UP PAVING

Prime Contacts:

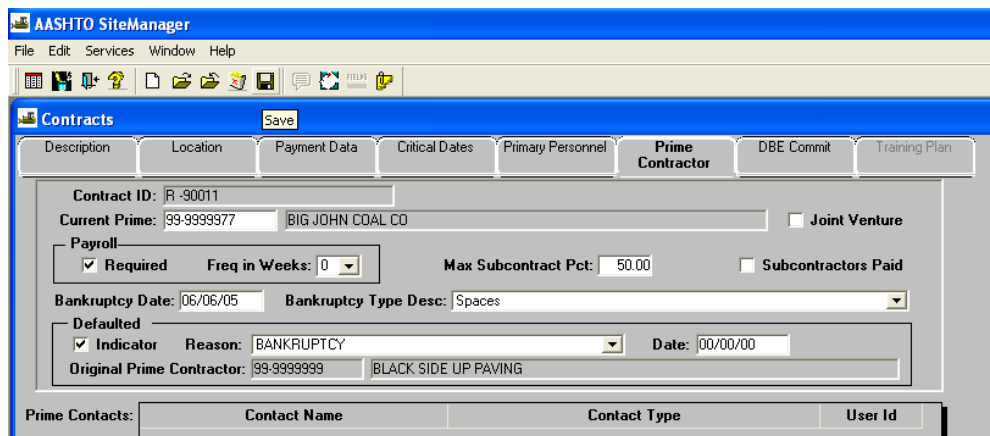
Prime Associates:

**Current Prime:** The new **Prime Contractor** will be entered in the **Current Prime** field.  
 “Right-click” in the **Current Prime** field.  
 “Click” on **Search**.



Use the Filter, Find or Search technique to locate the appropriate Vendor ID of the new Prime Contractor.

“Double-click” on the appropriate **Vendor ID**.



“Click” the **Save**  button located on the toolbar.

## F. Changing the status of the contract to Complete

**AASHTO SiteManager**

File Edit Services Window Help

**Contracts** Save

Description Location Payment Data Critical Dates Primary Personnel Prime Contractor DBE Commit Training Plan

Contract ID: R-90011 Fed St/Pr Proj Nbr: STP 3387005  
Status: Complete Primary PCN: 9620710  
District: Active Area:   
Progress Sched: Archived Variance Pct: .00  
Desc: Complete INTERSECTION IMPROVEMENT AND TRAFFIC SIGNAL MODERNIZATION  
Time Charges: Pending Bid Days: 70 Bid Amt: \$658,493.35  
Contract Type:  VEMENT  
Work Type: INTERSECTION IMPROVEMENT  
Spec Yr: 1995 Unit System: Metric Suppl Spec Bk Yr: 2004 Alt ID:   
Funding: ☐ Federal ☐ State/Province ☒ Both  
☐ Fed Oversight ☐ Local Oversight  
Proposal Fund Type: F/S

Wage Decision:

Wage Decision ID	Wage Decision Description	Genl Wg Dcsn ID
INDOT001	State Default Wage Decision	INDOT001

Before changing the status of a contract to complete, the following must occur:

- The Physical Work Complete Date in the Critical Dates tab must have an Actual Date.
- All Critical Dates and Key Dates marked 'Required to Finalize' must have Actual Dates.
- All Checklist Scheduled Events must have Actual Dates.
- All Items must have approved final quantity.
- No Change Order can have a status of pending.
- All Progress and Final Estimates must be paid.
- All Disputes and Claims must be resolved.

“Click” on the **Description** tab.

When the contract is ready to be completed, “click” on the **Status** drop-down list.  
“Select” **Complete**.

NOTE: the Actual Date field for **Physical Work Complete Date** in the **Critical Dates** tab of the **Contracts** window must be populated prior to changing the **Status** to **Complete**.

“Click” the **Save**  button located on the toolbar.



Note: This error message can indicate that the Physical Work Complete Date has not been populate in the Critical Dates tab of the Contracts window.

“Click” Ok.

**Contracts** [Close]

Description	Location	Payment Data	Critical Dates	Primary Personnel	Prime Contractor	DBE Commit	Training Plan
<div> <div> Contract ID: R-90011  Status: Complete  District: 660  Progress Sched:   Desc: INTERSECTION IMPROVEMENT AND TRAFFIC SIGNAL MODERNIZATION  Time Charges: WORK DAYS  Contract Type: INTERSECTION IMPROVEMENT  Work Type: INTERSECTION IMPROVEMENT  Spec Yr: 1995  Unit System: Metric  </div> <div> Fed St/Pr Prj Nbr: STP 3387005  Primary PCN: 9620710  Variance Pct: .00  Bid Days: 70  Bid Amt: \$658,493.35  Proposal Fund Type: F/S  </div> <div> Funding:  <input type="radio"/> Federal  <input type="radio"/> State/Province  <input checked="" type="radio"/> Both  <input type="checkbox"/> Fed Oversight  <input type="checkbox"/> Local Oversight  </div> </div>							

Wage Decision ID	Wage Decision Description	Genl Wg Dcsn ID
INDOT001	State Default Wage Decision	INDOT001

“Click” the **Close**  button located on the toolbar.



## Modifying the Contracts Window

### A-1-1-b Group Exercise

The Project Manager has changed to Doloris N. Sents for Contract R -90003.  
Modify the Contract window accordingly.

Log into SiteManager as: update

Password: pass

“Double-click” Contract Administration (+) icon.

“Double-click” Contract Records (+) icon.

“Double-click” Contract icon.

Click the Open button

Select

Contract ID: R -90003

Click the Generic Field button located on the toolbar.

Program Budget Manager      Doloris N. Sents

Click the Generic Field button located on the toolbar.

Click Save